

ST. FRANCIS HOSPITAL AND HEALTH CENTERS
EDUCATION COMMITTEE
APPLICATION FOR TUITION REIMBURSEMENT

NAME _____ ID# _____ Phone# _____

ADDRESS _____
(Include Street #, City, State & Zip)

DEPARTMENT _____ POSITION _____

EMPLOYMENT DATE _____

FULL-TIME EMPLOYEE _____ REGULAR PART-TIME EMPLOYEE _____
(40 Hours or more per pay period)

UNIVERSITY _____

IS THIS REQUIREMENT FOR DEGREE? YES _____ NO _____

IS YES, WHAT DEGREE? _____

IF YES, DOES THIS DEGREE COVER THE MINIMUM REQUIREMENTS FOR YOUR PRESENT
POSITION OR QUALIFY YOU FOR A NEW FIELD? YES _____ NO _____

ARE THESE COURSES JOB RELATED? IF SO, HOW? _____

NAME & NUMBER OF COURSE _____

DATE OF COURSE _____ CREDIT HOURS _____

NAME & NUMBER OF COURSE _____

DATE OF COURSE _____ CREDIT HOURS _____

NAME & NUMBER OF COURSE _____

DATE OF COURSE _____ CREDIT HOURS _____

DO NOT COMPLETE THIS SECTION

ID # _____

HIRE DATE _____

FULL TIME ___ PART TIME ___

DATE IN STATUS _____

% REIMBURSED _____

AMOUNT \$ _____

_____ X **CREDIT HOURS**

EMPLOYEE'S SIGNATURE

DATE

DEPARTMENT DIRECTOR'S SIGNATURE

DATE

(RETURN COMPLETED FORM TO FINANCE)

SEE BACK PAGE IMPORTANT INFO.

ST. FRANCIS HOSPITAL AND HEALTH CENTERS EDUCATION COMMITTEE
SUPPLEMENTAL INSTRUCTIONS TO APPLICATION FOR TUITION REIMBURSEMENT

1. Tuition reimbursement is subject to administrative policies and procedures no. 950.06.
 - FT employees – 7 Credits/Semester (max =21 credits per year)
 - RPT employees – 3 Credits/Semester (max =9 credits per year)
 - College credited courses only
2. Reimbursement for courses leading to degrees which cover the minimum requirements for an employee's present position or qualify them for a new field are considered additional compensation to that employee and are subject to withholding and employment taxes. Examples of taxable reimbursements would be an LPN taking courses for an RN degree or someone not in management taking masters in management of masters in business administration courses. Conversely, someone already in management is not taxed such masters courses.
3. If the courses pass the test in #2, they then must be evaluated as to whether they are job related. If so, they are not taxable. If not job related, withholding and employment taxes must be withheld.
4. Expenses in excess of reimbursement are tax deductible by the employee if the reimbursement is non-taxable. If the reimbursement is taxable, any excess of expenses is not tax deductible.
5. The accounting department will be relying on the information provided on the application to determine whether taxes should be withheld. By signing the form, both the employee and the department director are attesting to its accuracy.
6. A copy of the application must be submitted with each request for reimbursement.
- 7. Grade report as well as receipt showing payment of course must be provided (along with this form) to receive reimbursement.**
- 8. Reimbursement is made on the 2nd payroll of each month. All completed forms and necessary paperwork (grades/course receipt of payment) by end of month to be eligible to be reimbursed with following 2nd payroll of month.**